

Purpose

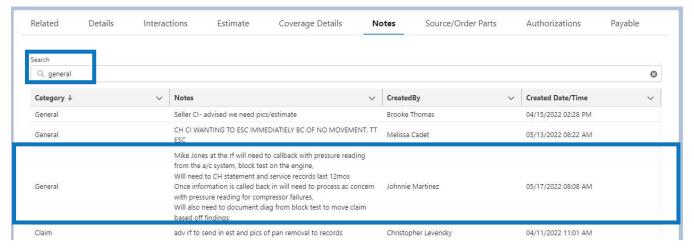
This Job Aid is intended to outline expectations of adjusters, customer service reps, when taking a live call.

Teams Impacted

- Claims
- Customer service

Procedure

- Greet the caller Thank you for calling AAS this is.... Can I please have your claim # or last 6
 of the vin. Then follow Sop for Contract Holder Search & Verification to pull up the
 contract/claim information.
- Now that the claim is pulled up you must read the detailed [Notes] for was last done. Make sure to search [General] to check for the status update note, look for the newest created date/time to the right of the screen.



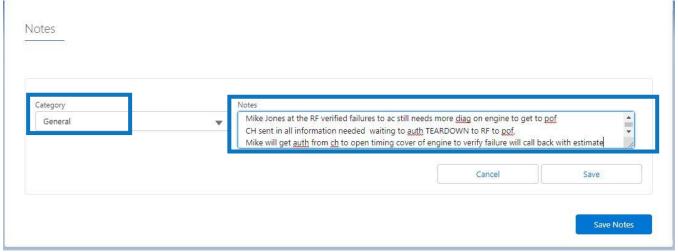
3. Now is the time to verify where we are in processed on the claim so far, start by checking for the following:

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- a. 3c's in detail
- b. Are records/tow bill needed?
- c. Customer statement noted
- d. Estimate keyed in
- e. Do we need to set inspector or have pictures sent in?
- f. Sourcing after failure demonstrated
- g. Key in most cost-effective part to claim
- 4. Depending on the notes will help see what steps from #3 you're on.



- 5. Process the missed information to help move the claim forward
- 6. If the caller needs to send any information or inspection has been sent out, a Pending Status note must be entered under General category. Make sure to include A-C so the next adjuster that gets that call on this claim keeps the claim moving in the same direction.
 - a. What is needed from Repair facility?
 - b. What is needed from the customer?
 - c. Next step once information is collected



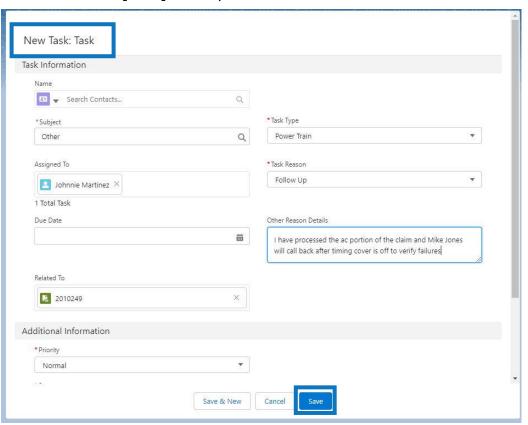
IMPORTANT: Ensure you are setting your status note under the General category. This will provide an easier means of sorting notes.

- If you have collected the detailed information and you can auth the claim, let's get the claim authorized.
- 8. If the claim is denied, please make sure you note the claim in detail on why claim is denied and follow the denial process per SOP.

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9. Once you have made movement on the claim as a courtesy to the assigned adjuster, send them a **[Task]** of the updated information made on the claim.



Approval & Revision

Date Created 5/13/2022	Created By Johnnie Martinez		Date Approved 5/17/2022		Approved By Jason Dolan	
Date Revised [Date]	Revised by [Revisor Name]	[Enter wha	Description at has changed revious version]	Date A [Date]	approved	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	[Enter wha	Description at has changed revious version]	Date A [Date]	pproved	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	[Enter wha	Description at has changed revious version]	Date A [Date]	Approved	Approved By [Approver's Name]



Date Revised Revised by

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